

FIG. 1

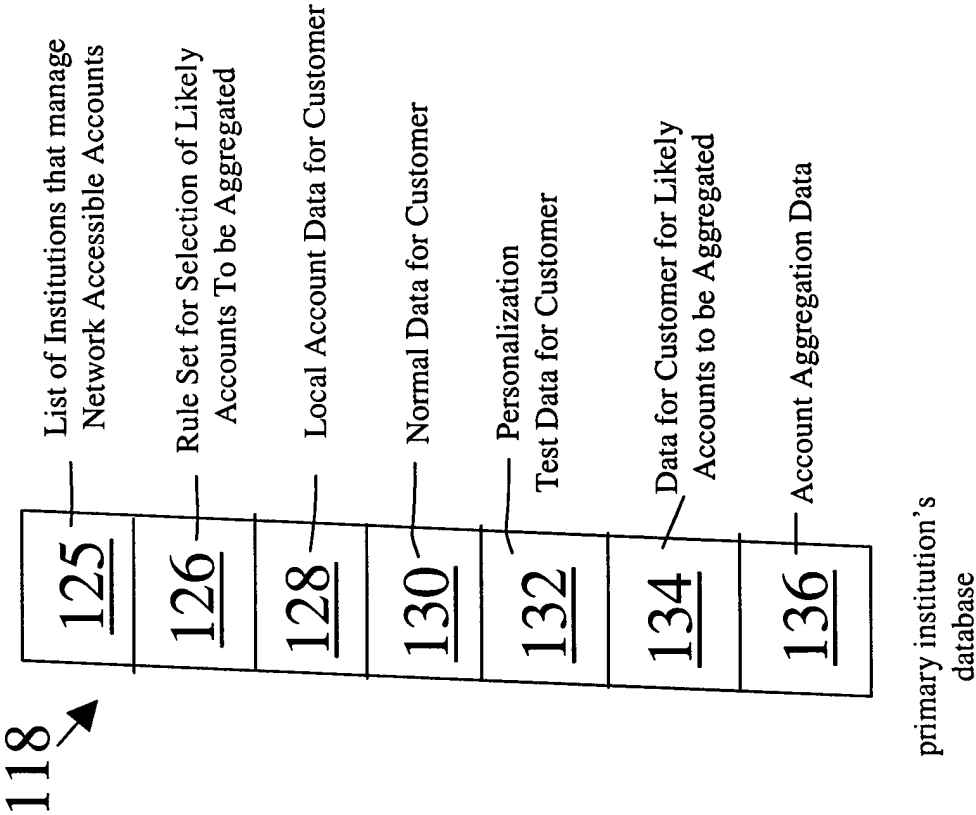


FIG. 1A

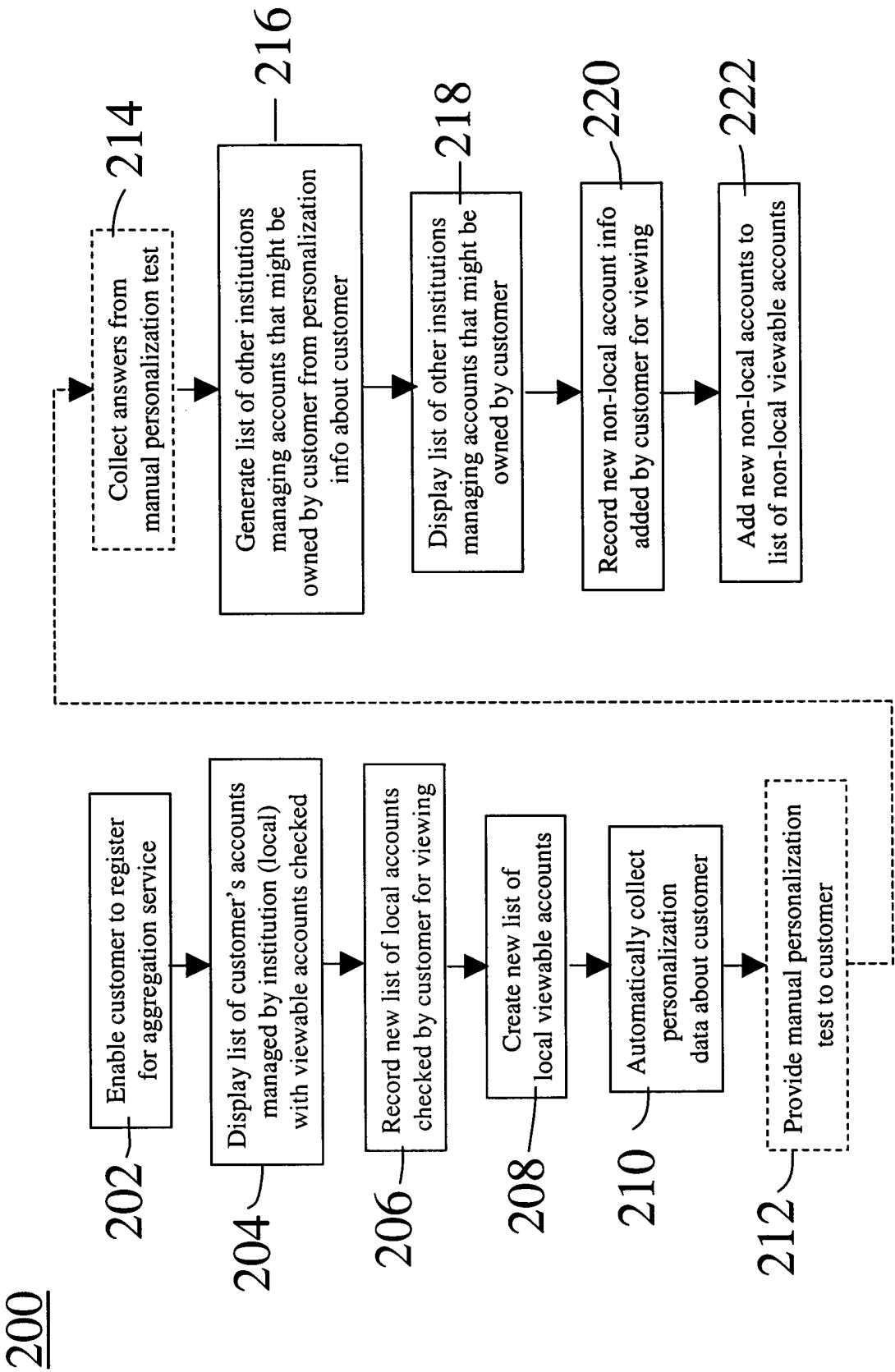


FIG. 2

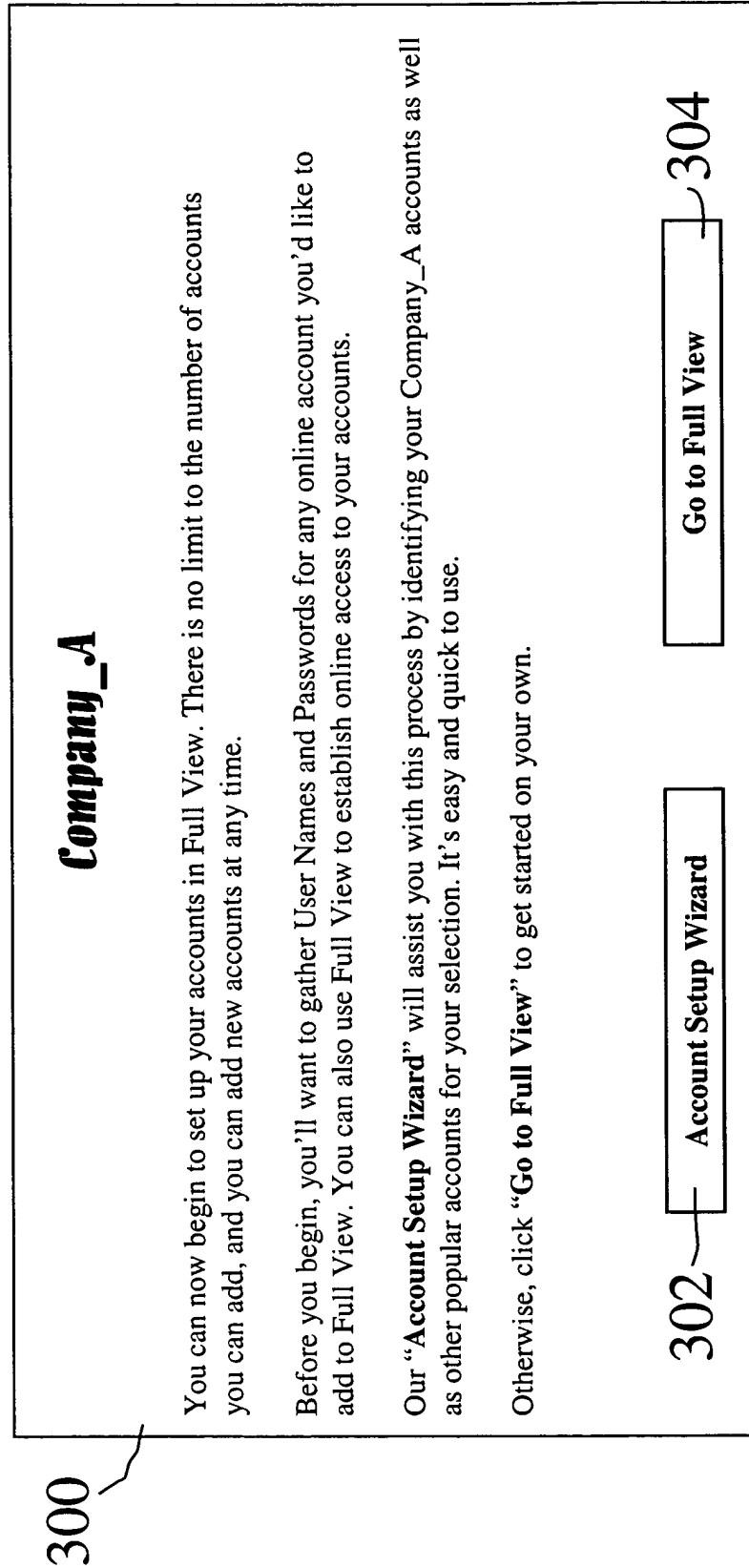


FIG. 3

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ACCOUNT SETUP WIZARD

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Step 1: Company\_A Investment Accounts....

Please select the Company\_A accounts you wish to add to Full View:

Company\_A Personal Investing

☐ Acct: Y012345601

☐ Acct: T131313112

☐ Acct: ABCI12345

Company\_A NetBenefits

☐ Acct: Profit Sharing -81111

Company\_A Charitable Gift Fund

☐ Acct: CGF136348

☐ Company\_A Bill Pay

\$20,451.00

\$ 5,024.14

\$ 2,025.46

\$10,250.00

\$ 340.24

Go to Full View

Continue with Wizard

FIG. 4

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**Step 2: Other Accounts.....**  
Please select the accounts you wish to add to Full View:

☐ Financial\_A

☒ Financial\_B

☐ Financial\_C

☐ Bank\_A

☒ Bank\_B Online

☐ Bank\_C

☐ Creditcard\_A

☒ Creditcard\_B

☐ Airline\_A Miles

☐ Email\_A

Continue with Wizard

Go to Full View

FIG. 5

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ACCOUNT SETUP WIZARD

Step 2a: Other Investment Accounts.....

Please select the investment accounts you wish to add to Full View:

☒ Financial\_A

☐ Financial\_B

☐ Financial\_C

☐ Broker\_A

☐ Bank\_A Investments

☐ Broker\_B

Continue with Wizard

Go to Full View

FIG. 6

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ACCOUNT SETUP WIZARD

Step 2b: Other Financial Accounts.....

Please select the accounts you wish to add to Full View:

☐ Bank\_A

☒ Bank\_B Online

☐ Bank\_C

☒ Credit\_Card\_A

☐ Credit\_Card\_B

☒ Credit\_Card\_C

☐ Credit\_Card\_D

Continue with Wizard

Go to Full View

FIG. 7



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ACCOUNT SETUP WIZARD

Step 2c: Other Accounts....

Please select the investment accounts you wish to add to Full View:

☒ Airlines\_A Miles

☐ Airlines\_B Miles

☐ Airlines\_C Miles

☐ Email\_A

☐ Email\_B

Finish Wizard

FIG. 8

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Add a New Account

322

Add a New Account

324

Add a New Account

**Sign In Information**

If you have online access to your account at Bank\_A Online, please enter your sign-in information exactly as you would at their Web site.

Bank\_A Online User ID:

Bank\_A Online Authentication:

Verify Authentication

If you have an account at Bank\_A Online but do not have on-line access, click here.

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FIG. 9